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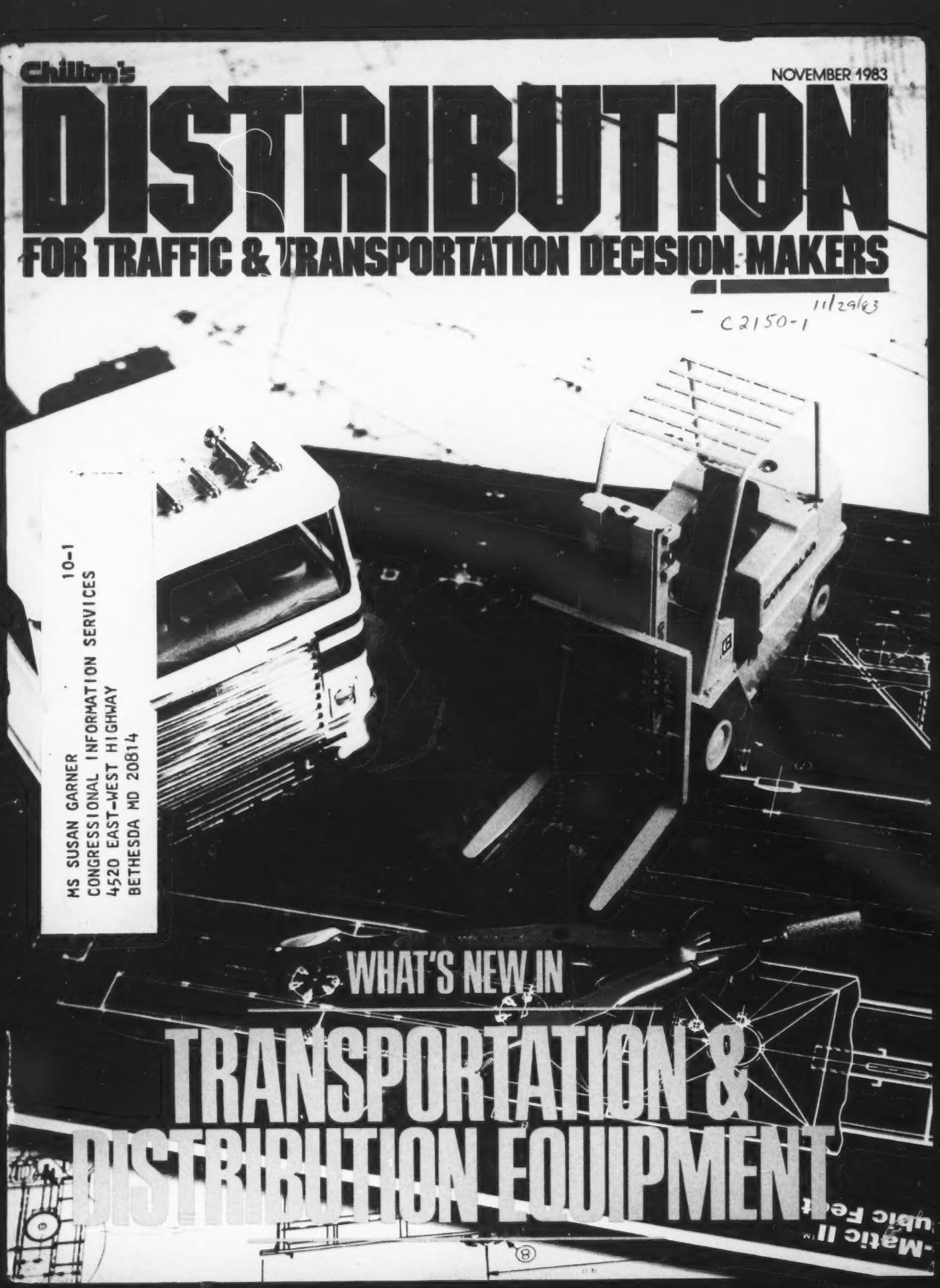

WHAT'S NEW IN

TRANSPORTATION & DISTRIBUTION EQUIPMENT

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VOLUME 82, NUMBER 11
NOVEMBER 1983

Chilton's
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FREDERICK A. STANLEY, PUBLISHER — ESTABLISHED 1901 AS THE *TEAMSTER* — CLIFF MITCHELL, CIRCULATION MANAGER

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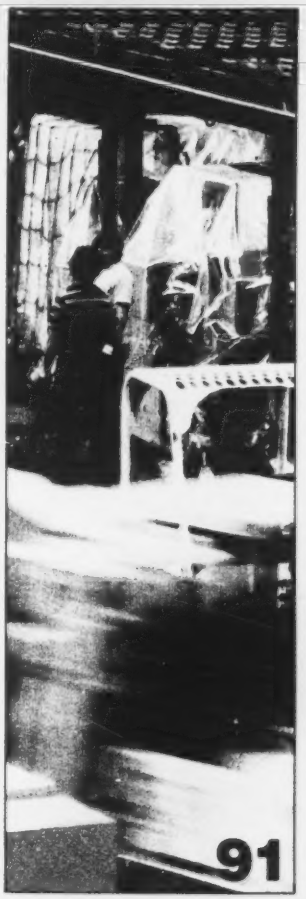

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DIALOGUE

ETHICS: A MATTER OF COURSE

In August we asked: "What are the key ethical problems you face?" Here are some of the problems and concerns that were quickly relayed back to us as part of a larger-than-usual outpouring. The returns have been broken down by the industries represented (for this topic only we asked that respondents not supply their names).

"At what point does the taking of gifts and/or services from the best and proven supplier become unethical? I'm talking about gifts 'within reason.' "—**Purchasing agent, intimate apparel, Tex.**

"I face no ethical problems. I represent only my employer and base decisions on 'what is best for my company.' "—**Manager of distribution, paper, Ala.**

"We draw the line on a gift that would be too much, or dealing with a carrier that offers a very high discount and has a poor reputation."—**Shipping supervisor, paper, Ill.**

"We seek the lowest possible rates commensurate with service requirements and regardless of freight terms. Company policy forbids gifts that exceed $25."—**Regional traffic manager, packaging, Ga.**

"Should I discuss with a carrier representative the discounts of another carrier, even if that other carrier's discounts are published?"—**Rate and route specialist, plastic, Tex.**

"Common sense clearly dictates what is right and what is unethical. There is no grey area."—**Rail analyst, chemical, Va.**

"Frankly, I believe it is our lack of unethical actions that makes ours a 'preferred company' to do business with today."—**Distribution analyst, petrochemicals, Okla.**

"The company has a corporate code of conduct, and I am expected to comply."—**Assistant transportation manager, chemical manufacturing, Ill.**

"Where is the cutoff point between a gift and a bribe?"—**Zone distribution manager, chemical manufacturer, Oh.**

"While the recession has toned down carrier entertainment, the same recession has brought about extravagant discounting by carriers with consistently poor operating ratios. Ethically, to use these carriers for short-term gains leads to their long-term demise."—**Traffic manager, candy manufacturing, Oh.**

"My key ethical problem is keeping relationships with motor carrier personnel on a strictly business nature, and not letting lunch or entertainment influence carrier selection."—**Transportation coordinator, beverage, Va.**

"Cronyism between carriers and dispatchers or coordinators can become a problem."—**General transportation manager, food manufacturing, Mass.**

continued on page 8

QUESTION OF THE MONTH

"Don't look back, they might be gainin' on ya," said baseball philosopher and pitcher Sachel Paige about competitors, old age and just about everything else.

This philosophy seems to be losing its followers, at least those in the distribution industry. Judging from the program at this year's meeting of the National Council of Physical Distribution Management, more and more emphasis is being put on measuring your own performance as well as your competitors'. Management certainly wants to know who is gaining on the company, and wise distribution managers are looking back, if only to see if management is peering over their shoulders.

But what is the best way to measure just how well transportation and distribution departments are doing?

Should transportation and distribution just be measured as a cost center? Or, should they be measured in terms of contribution to profit?

Every company has its own way of measuring the performance of transportation and distributon. But often these methods depend more on habit than good sense.

Tell us how your department is measured on our Dialogue card, and we'll tell you how you measure up to the competition. And maybe you'll get some ideas about how to convince your management of the true value and performance of your department. □

SURVEY RESULTS

From your responses to our August questions about ethics, it became quite apparent that those who work for companies with a code of ethics find those codes realistic and functional; 93 percent had no complaints. In those companies that don't have a code of ethics for their distribution and transportation departments, 72 percent said a code isn't needed to maintain ethical standards; 27 percent agreed that a code could be helpful.

QUESTION OF ETHICS

My department has a code of ethics	52%
Does not have a code	42%
Carrier gifts and entertainment are too extravagant	26%
Are not too extravagant	74%
Gifts influence my decisions	10%
Do not influence my decisions	90%
I am forced to seek unfair discounts and rebates	7%
I am not forced to seek unfair discounts or rebates	93%
I have been offered what I could consider a bribe	41%
I have not been offered a bribe	58%

TO THE EDITOR

Jean V. Strickland's column in the August issue (p. 22) did a fine job stating the case for favorable consideration of federal excise tax relief for piggyback trailers.

I think it is important that your readers understand that Transamerica Interway has for some time been in the forefront of the effort to bring equity to the piggyback excise tax situation. Several years ago, in connection with the Federal Highway Cost Allocation Study, we submitted an exhaustive comment which argued that piggyback trailers are entitled to relief from excise tax. And that argument, apparently, was successful: the Department of Transportation's final report on the issue said that "consideration should be given to relieving truck trailers that are manufactured for use as piggyback trailers from the new excise tax."

Having made the case for the exemption, we were then concerned when Congress not only proposed not to give piggyback trailers an exemption, but also added insult to injury by giving one to the RoadRailer, which, apparently, has no better case to make.

I don't believe, therefore, that our position should be characterized as one of sour grapes. It is, in our view, more appropriately labeled an equity argument. Congress should treat both the RoadRailer and the piggyback trailer the same, because they both use the highways to the same extent. Indeed, we have found that this equity argument carries considerable weight with Senate and House members.

I would also like to mention that the list of supporters for our position is growing. Xtra and Brae are two trailer leasing companies that have recently joined in support. While the Association of American Railroads is not actively supporting the bills for the reasons your article cited, I can say that individual railroad support is growing. Most notably, the Burlington Northern and the Southern Pacific are actively supporting the exemption. I am confident that by the time of the Senate hearing the list of railroad supporters will have expanded even further.

Dennis J. Kenny
Vice President & General Counsel
Transamerica Interway, Inc.

continued from page 7

"Problem: buying the business with weekend golf and fishing trips, expensive gifts or under-the-table cash." —**Traffic manager, food manufacturing, Pa.**

"Concern: whether it is ethical, considering their past practices on the other side of the fence, to whipsaw carriers with rates to the point where they lose." —**Distribution and warehouse manager, food manufacturer, N.J.**

"My company has a clear and comprehensive conflict-of-interest policy. Employees are periodically reviewed, and a written response by the employee is required." —**Assistant traffic manager, tobacco products, Va.**

"When in doubt, don't. Carrier gifts or entertainment beyond lunch have to leave you obligated. I feel my employer pays me to do my job—not a carrier." —**Traffic manager, flour mill, Oh.**

"My firm has preached ethics for many years. We have earned the respect of transportation people to the point where ethics is now neither a problem nor a temptation." —**District traffic manager, grain processing, Iowa.**

"Most of our carriers realize that our industry will not tolerate dishonesty or unethical behavior." —**Traffic manager, winery, Calif.**

"I will not allow the purchase of transportation through a backdoor policy. If a carrier does this, it is out. If the carrier can buy freight, it should do so through tariff applications." —**General manager of traffic and transportation, corn milling, Iowa.**

"My company's interest comes first. I would not do anything that would be embarrassing either my company or myself." —**Traffic manager, retailer, Mo.**

"Since deregulation, carriers have become very aggressive in offering lavish entertainment and gifts. Sometimes it's been very hard to refuse. Carriers must be reminded to keep matters on a business level." —**Traffic manager, retail, Ill.**

"One problem is watching some others not comply with our code. Also, management often succumbs to carrier offers and allows open disregard for the code." —**Senior transportation analyst, automotive parts distribution, Mich.**

"Carriers that have tried to 'buy' their way in have been refused and locked out." —**Physical distribution manager, dry goods, Calif.**

"Problem: being offered kickbacks by sales reps working on commission." —**Traffic manager, retail, Ill.**

"Concern: the practice of vendors adding freight costs to their invoice. Are the charges valid and accurate?" —**Distribution superintendent, publications, Miss.**

"Concern: whether to accept freely offered discounts or commodity rates which, in our opinion, will cause the carrier to lose money and, perhaps, go out of business." —**Assistant traffic manager, rubber/plastic housewares, Oh.**

"I worry about the personnel under me and shipping and receiving personnel taking gifts or money for freight." —**Traffic manager, truck manufacturing plant, Oh.**

"Problem: carriers that request copies of, or tariff numbers of, competitors so they can match rates. Do I then become a conduit between competitors fixing rates?" —**Traffic manager, lighting fixtures manufacturer, Wis.**

"My goal is to obtain the best freight and customer service cost available, and I see no conflict of interests." —**Distribution manager, furniture, Wis.**

"Problem: the perception of peers in my own company that all carriers are crooks, and that I'm probably on the take because I work closely with them." —**Distribution trainer, office products, N.J.**

"Problem: trying to remain honest in the face of a 'who cares' attitude." —**Vice president/general manager, public warehouse, N.Y.**

"Problem: trying to keep large and small common carriers alive. A few large carriers offer large discounts and extravagant entertainment that serve to defeat this purpose." —**Traffic manager, doors and frames manufacturer, Mass.**

FORECAST

BY DR. RICHARD LANCIONI

WHO SHOULD WE BELIEVE?

There is no doubt that the current recovery is one the longest and most stable growth periods the economy has experienced in the last 10 years. Inflation has increased at a level below 5 percent for much of the year; interest rates have moderated with the prime rate averaging 11.5 percent; and employment has gradually declined to below 10 percent.

With all of this positive news, one would expect uniformity as to what the future holds, but this doesn't seem to be the case. The Conference Board's latest reports show consumer confidence remaining high with its index reaching 83.9 through September.

The Board's consumer buying plans index also rose to a new yearly high of 108.6. Consumer plans to buy automobiles increased to 8.6 percent; home-buying by 3.7 percent; and plans to buy major appliances by 29.9 percent. These recent increases reflect the continued confidence of consumers.

In contrast, in a recent meeting of the Business Council where the nation's business leaders discussed the future of the economy, the view was mixed. The heads of the major railroads were optimistic about the future, whereas the heads of the some of the major corporations (FMC, TRW, Bechtel Industries) tended to be cautious and wary about the future. Much of the pessimisim was focused on the uncertain status of the international debt crisis and the looming high deficits resulting from the spending policies of the federal government.

The third group to express its opinion about the economy was the government economists. As usual, they forecast continued recovery but this time they predicted only moderate growth for 1984. Whom should one believe? As one distribution manager stated, "The only people I believe about the future of the economy are our customers. If they are confident about their own outlook then they place orders. If they are not, then our business drops off. It is as simple as that." □

DISTRIBUTION INDEX FORECAST INDICATORS

	Oct.83	Nov.83	Dec.83	Point change from Previous Period
Truck Shipments:	122.1	124.6	124.9	+0.3
Rail Shipments:	113.6	114.9	115.1	+0.2
Air Shipments:	119.7	121.2	121.2	+1.6
Water Shipments:	109.6	111.3	112.1	+0.8
Whse Space Utilization:	119.4	122.8	123.4	+0.6
Inventory Valuation:	105.9	106.3	107.9	+1.6
Cumulative Index:	118.8	120.9	121.5	+0.6

The Distribution Index for November shows more modest increases in all areas of the Distribution sector. If these expectations prove to be correct, the recovery is not continuing at its earlier robust levels. This leveling off seems to be most apparent in rail and truck shipments, which should be experiencing a seasonal spurt. Truck shipments rose to 124.6 through November and are expected to rise by only 0.3 points through December, to 124.9. Rail shipments are also expected to rise by a small amount, during the last part of 1984, to 115.1 through December. The largest single increase in the Index is for Air shipments which will increase by 1.6 points to the 122.8 level through December. The strong showing in the air sector suggests that shippers are still being cautious about inventory build ups. Water shipments are expected to increase by 0.8 points for the last quarter. Inventory valuation, the most sensitive indicator of possible inflationary changes is expected to reach the 107.9 index level through December reflecting the modest pressure on prices.

TRANSPORTATION INDICATORS—

Monthly/Quarterly Trends

Diesel Fuel Prices (Cents per Gallon/Average)
(Interstate Commerce Commission)

Aug.83	Sep.83	Oct.83	Jan.84 (Forecast)
1.227	1.229	1.229	1.25

Dow Jones Transportation Index (Index Point Closing)
(Wall Street Journal)

Sep.15	Oct. 1	Oct. 17	Jan.84 (Forecast)
563.4	560.3	591.6	624.4

Rail Freight Traffic (Billions of Ton Miles)

1st qtr.	2nd qtr.	3rd qtr 83.	3rd qtr. 82
195.4	401.7	562.1	563.7

Carriers and shippers face a somewhat uncertain future in regard to diesel fuel prices during the next few months. Prices have been creeping up since mid-summer, and in recent weeks about one cent has been added to the price of fuel tracked by the Interstate Commerce Commission. Prices are expected to increase more in the last quarter of 1983, and perhaps even more as winter really gets started. Prices will continue to increase gradually as demand turns up later in the winter, when diesel fuel and heating fuel are both in greater demand. Investor confidence in the transportation industry continues to remain at high levels with the transportation index remaining in the 570 to 590 range for most of the last quarter of 1983. This indicator shown continues to reflect expectations of more freight movements and higher rate levels approximately six months in the future. The transportation index will easily jump into the 600s by year's end, and would probably reach these levels sooner if financial uneasiness in the airline sector had not scared off investors who see transportation stocks as good earnings candidates. Rail tonnage continues to improve to the point it should match or exceed 1982 figures.

DISTRIBUTION CAREERS 1983

By BERNARD J. LA LONDE, PH.D., Riley Professor of Marketing and Logistics, and DAVID E. LLOYD, Research Associate, both of The Ohio State University

In each of the past twelve years, the Logistics Research Group at the Ohio State University has conducted a survey of the career patterns of distribution executives in U.S. firms. Originally this study sought to answer basic questions on the background, training, work experience and demographic characteristics of those executives. However, in recent years the survey has expanded in scope to include trend analysis of the attitudes and opinions of distribution executives as well.

Specifically, the 1983 survey sought to find answers to the following basic questions:

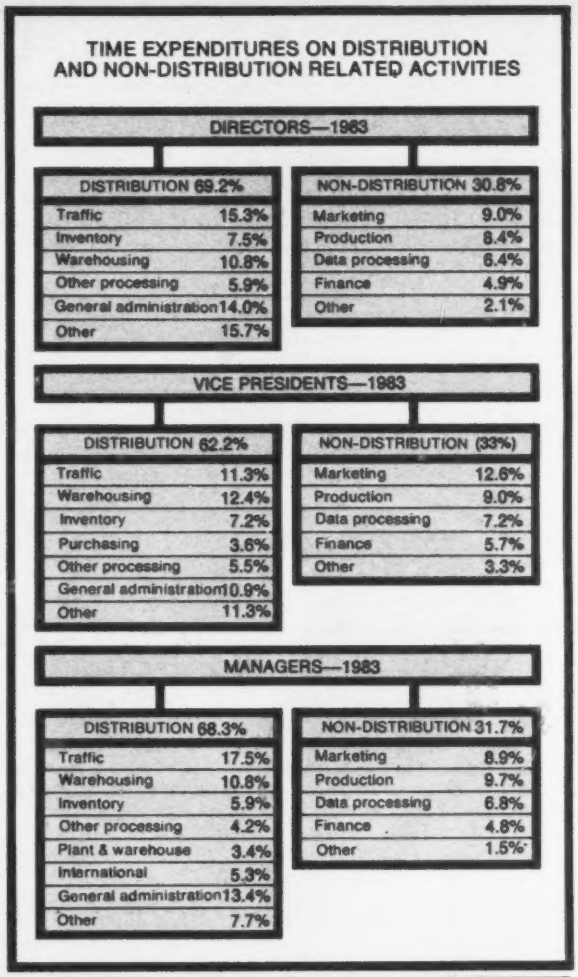
1. How is the distribution function organized?
2. What are the primary responsibilities for the distribution executive?
3. Who is the distribution executive?—A demographic profile.
4. How does the distribution executive perceive the future?

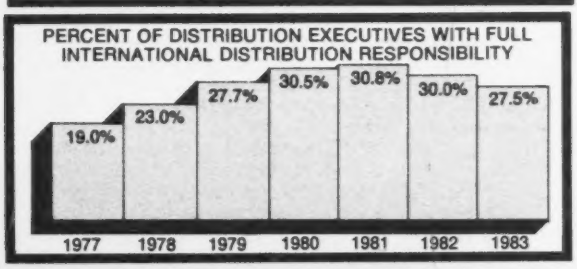
The data utilized in this study were obtained from a detailed four-page questionnaire mailed to 567 members of the National Council of Physical Distribution Management (NCPDM) during the summer of 1983. A concerted effort was made to acheive a sample balanced both on industry and geographic bases. In cases where two or more NCPDM members were listed within the same company, the survey was sent to the executive with the higher perceived position. The 171 questionnaires returned represented a response rate of 31.2 percent.

The questionnaires were coded, keypunched and analyzed using the computer facilities of the Ohio State University. Tabulation of the results involved utilizing standard two-variable cross-tabulations and summary statistics, and the summary results are reported in the body and tables of this report.

Every effort was made to classify accurately the open-ended survey responses and to interpret multiple job title classifications meaningfully. The responses to this year's survey indicated that a multitude of descriptive distribution job titles still exist for the key distribution executive. However, because the primary objective of this research has been to provide trend analysis of broad classifications, the authors still believe that the best analysis of the data continues to be one which uses the three broad managerial classifications of manager, director, and vice president.

The reader will note that in the discussion and tables, comparisons are made with survey findings from earlier years. Caution should be exercised when generalizing or interpreting year-to-year comparisons, because the returned questionnaires are anonymous and there is no way, given the research design, to ensure that the respondents are identical on a year-to-year basis.

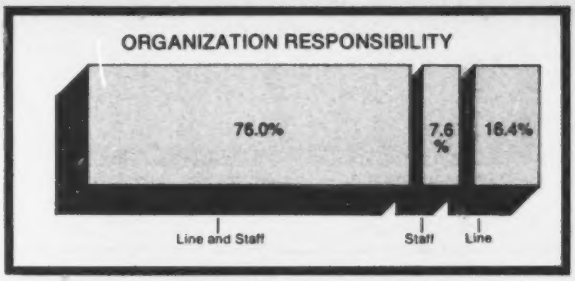


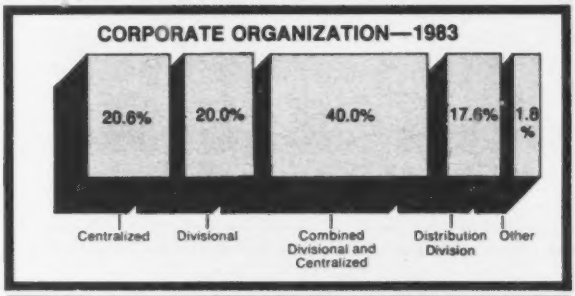


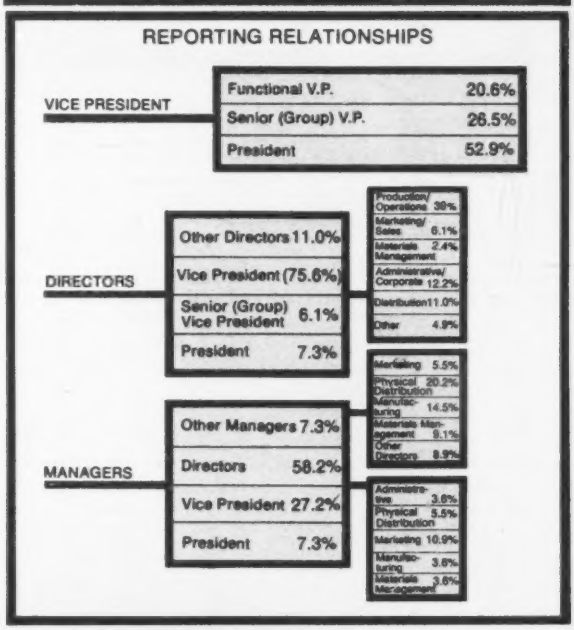
WHAT ARE THE PRIMARY RESPONSIBILITIES OF THE DISTRIBUTION EXECUTIVE?

The tables that respond to this question are Tables 6-9. The primary trends in specific responsibilities of the distribution executives have indicated a gradual shift from a narrow traffic and warehousing responsibility to a broader range of responsibility both within and outside the distribution area.

- Distribution executives spend approximately 30 percent of their time outside the distribution function. About 60 percent of the time spent outside of the function is spent interacting with the marketing and production areas.
- Since deregulation, we find distribution executives are spending more time on traffic management. Managers continue to spend approximately 30 percent of their total time in the transportation and warehousing areas, whereas directors and vice presidents spend 25 and 30 percent respectively.
- The amount of time spent at all levels in "General Administration" has gradually risen over the past five years.
- Distribution executives at all levels now are spending approximately 20 percent of their non-distribution time interacting with data processing.

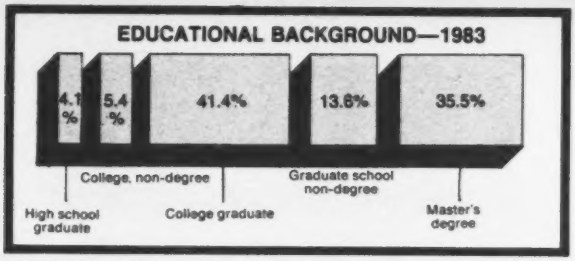


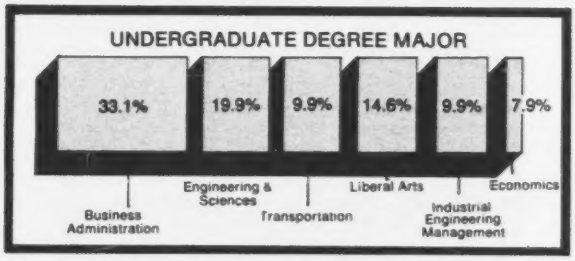


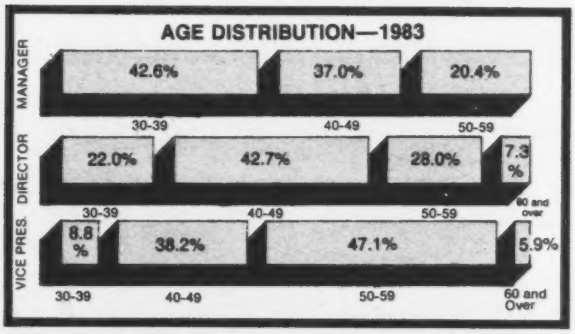


HOW IS THE DISTRIBUTION FUNCTION ORGANIZED?

During the past six years there has been some evidence of stability in primary organizational format of the distribution function. Approximately 80 percent of the respondents report both line and staff responsibility. On the specific positioning of the distribution function, 40 percent of the respondents report a combined centralized and divisional organization. Of the remaining respondents, approximately 20 percent report a divisional organization, 21 percent a centralized organization, and 18 percent a separate distribution division. The results show an apparent stabilization of the divisional format at the 20 percent level, while organization as a separate distribution division is increasing. During the past several years there have been some shifts in the evolving patterns of organizational relationships. Specific shifts are difficult to identify, but the findings seem to suggest that the distribution function is being linked with pre-production activities (purchasing, production planning, etc.) and a new form of total material flow organizational format is emerging. Evidence for this trend is also supported by a tendency for those executives reporting to a functional vice president to report to an operations function.

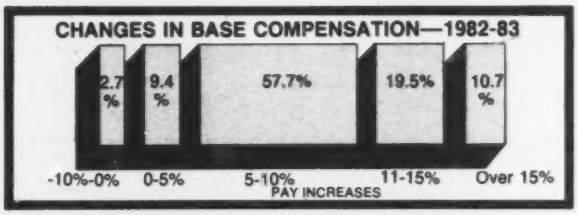






AVERAGE COMPENSATION—1983

	Manager	Director	Vice President
Top quarter	$67,920	$79,800	$125,500
Second quarter	$53,600	$61,600	$ 91,100
Third quarter	$41,900	$52,500	$ 73,300
Lowest quarter	$33,900	$40,400	$ 53,100
Average	$49,300	$58,500	$ 85,600



WHO IS THE DISTRIBUTION EXECUTIVE?

The age distribution of P.D. executives has held to the same general patterns in recent years, although the average age is increasing. The dominant age category for managers is 30-39; for directors, it is 40-49; and for vice presidents, the 50-59 age bracket.

The educational profile of the distribution executive saw only some random sample variations from the previous year. Emphasis is still on the college educated executive, as 96 percent of this year's respondents had at least some college and 91 percent had a college degree or more. Approximately half of the P.D. executives reported post-graduate work, with 36 percent reporting a master's degree or higher.

Average compensation levels for 1983, and increases in compensation levels for the 1983 period, are presented. Although the average increase in compensation was 10 percent, not all positions participated equally. While average salary levels increased for managers and vice presidents, the directors' average salary level was slightly lower than in 1982. For the first time, 3 percent of the executives surveyed reported reductions in compensation levels in 1983.

EDUCATIONAL NEEDS—1983

Area	First Choice	Second Choice
Finance	24.7%	17.5%
Data Processing, Simulation, Models	32.7%	24.6%
General Management	19.3%	9.9%
Marketing	8.8%	13.5%
Legal Environment	2.3%	1.8%

What are the major factors which will influence the growth and development of the corporate distribution function during the next decade?

Factor	Most Important	2nd. Most Important
Identification and control of distribution costs	22.8%	9.8%
Impact of deregulation	12.3%	11.0%
The economy	14.2%	13.5%
Utilization of computer based information systems	14.8%	15.5%
Customer service	14.2%	23.2%
Increased management knowledge and involvement	6.2%	9.0%

HOW DOES THE DISTRIBUTION EXECUTIVE PERCEIVE THE FUTURE?

The tables that relate to this question are Tables 15-17. This year, as in past years, respondents were asked, "If you were offered an opportunity to return to school in the near future for three months and could take a custom-designed curriculum, what kinds of things would you study?" For the first time since 1973, the financial area was not the dominant area. The trend noted last year has been realized and the data processing, simulation and modeling area has become the dominant preference for both first and second choice. The financial area continues to be important and upward trends are noted in both the general management and marketing areas.

The respondents were then asked to "identify the major factors which will influence the growth and development of the corporate distribution function during the next decade." Their summary responses are presented in Table 16.

In the 1983 survey, a number of significant changes occurred in this area:

- The respondents continue to rank their ability to identify and control distribution costs as a key variable in the future of the distribution function. Note also the growing importance of customer service.
- The pattern of response indicates a global view of the distribution process. While external factors (deregulation and the economy) continue to be important environmental factors, the distribution executive appears to now see the need to focus on internal factors (distribution costs, customer service, information systems and management emphasis) as well.
- The respondents also continued to be concerned about the application of MIS concepts and data processing technology to the logistics function.

The respondents were then asked to share their attitudes concerning a number of logistical statements (Table 17). The findings have included:

- 89 percent of the respondents noted that distribution is a more important corporate function than it was five years ago.
- 92 percent agreed that more specific goals had been developed for the distribution function in their firms over the past five years.
- 90 percent agreed that the computer is the key to better productivity in their firms.
- 89 percent agreed that the planning process has assumed more importance in the distribution function in their firms during the past five years.
- 84 percent of the respondents believed that deregulation will lower the costs of transportation.

STUDY IMPLICATIONS

Because the study has now been conducted annually for the past twelve years, it might be appropriate to identify the primary changes that have occurred in the distribution function over the past decade.

Positioning of the P.D. Function

- Over the past ten years there has been a shift from positioning the distribution function as a staff function to a line function or combination staff/line function.
- The number of respondents representing director or vice-presidential levels has more than doubled since the early 1970s. These shifts reflect an upward repositioning of the chief distribution executive of the firm.

Primary Responsibility of the Distribution Executive

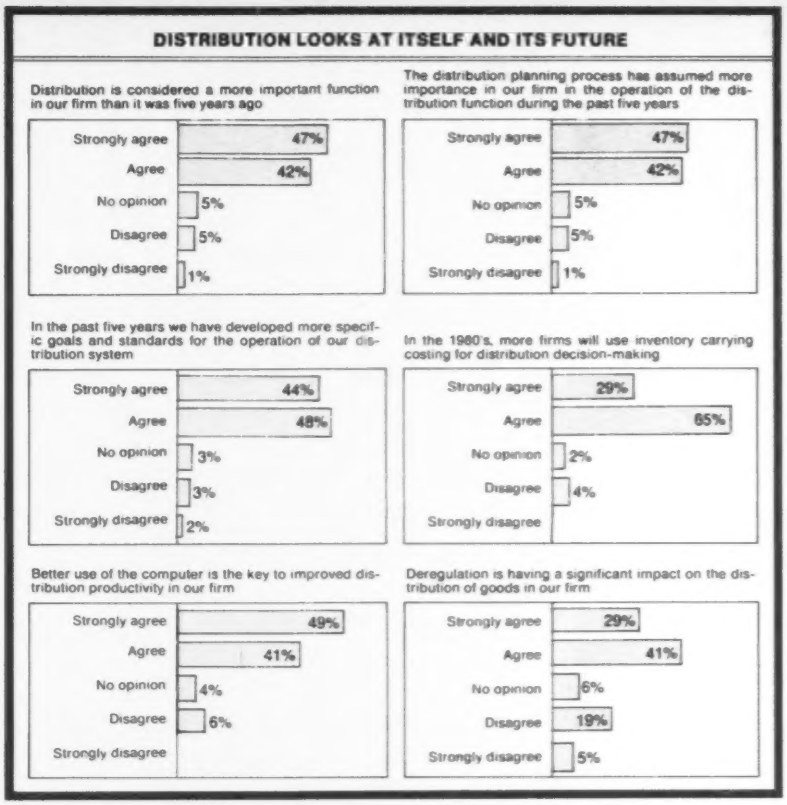
- In the early 1970s the typical distribution executive was largely concerned with a narrow range of activity—usually transportation and warehousing. By the early '80s, the P.D. function had been expanded to include activities ranging from forecasting to order processing.
- A corollary to the broadening of the P.D. function has been a shift in the "outer directed" focus of the distribution executive. That is, the distribution executive of the 1980s is spending a significantly larger share of the day interacting with the marketing, production, finance and data processing functions.

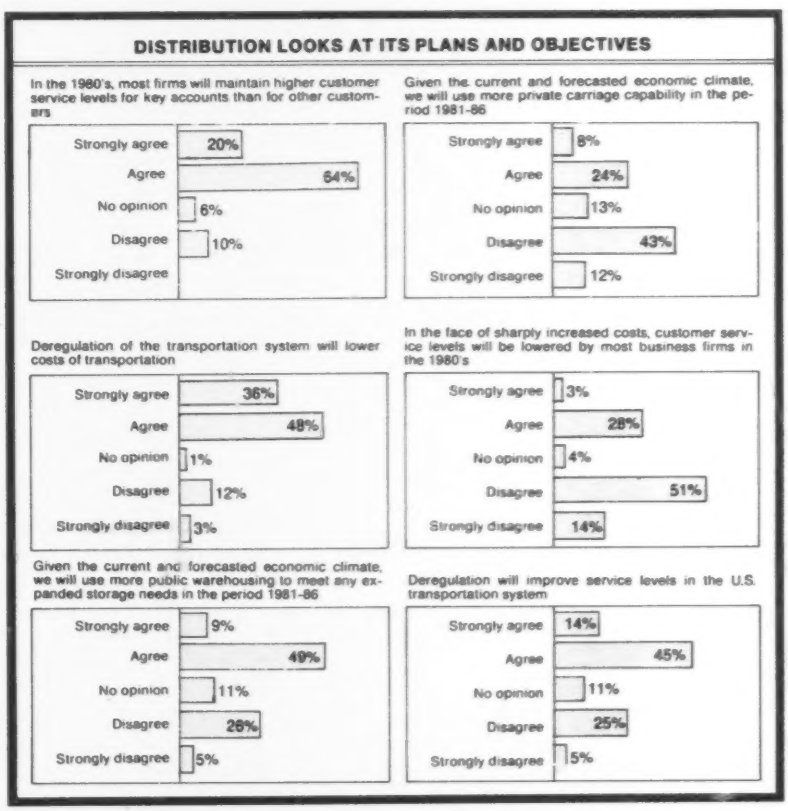
Future Directions

For the past three years there has been evidence of a growing interest on the part of the distribution executives toward more of a "management science"-ori-ented approach to management. This interest surfaces in a number of different ways.

- For the first time, "finance" was not identified as the most important learning need. First place in both the primary and secondary categories went to the general area of "data processing, simulation and models."
- There is continued evidence that an increasing number of firms are attempting to integrate the material flow process. That is, the organization and coordination of raw material, work-in-process and finished goods are being more closely integrated.
- During the first 10 years of the survey, the common complaint by many managers was that their senior corporate management "did not understand or appreciate" the corporate role of the P.D. function.

The survey evidence indicates that the direction of change has reversed in many respondent firms. Change has started to come from the "top down" rather than the "bottom up." If indeed this finding is confirmed, it means that pressure for change will come from senior management and that the speed of change in the distribution/logistics function will increase. ■


DISTRIBUTION LOOKS AT ITSELF AND ITS FUTURE
Distribution is considered a more important function in our firm than it was five years ago
Strongly agree 47%
Agree 42%
No opinion 5%
Disagree 5%
Strongly disagree 1%
The distribution planning process has assumed more importance in our firm in the operation of the distribution function during the past five years
Strongly agree 47%
Agree 42%
No opinion 5%
Disagree 5%
Strongly disagree 1%
In the past five years we have developed more specific goals and standards for the operation of our distribution system
Strongly agree 44%
Agree 48%
No opinion 3%
Disagree 3%
Strongly disagree 2%
In the 1980's, more firms will use inventory carrying costing for distribution decision-making
Strongly agree 29%
Agree 65%
No opinion 2%
Disagree 4%
Strongly disagree
Better use of the computer is the key to improved distribution productivity in our firm
Strongly agree 49%
Agree 41%
No opinion 4%
Disagree 6%
Strongly disagree
Deregulation is having a significant impact on the distribution of goods in our firm
Strongly agree 29%
Agree 41%
No opinion 6%
Disagree 19%
Strongly disagree 5%


DISTRIBUTION LOOKS AT ITS PLANS AND OBJECTIVES
In the 1980's, most firms will maintain higher customer service levels for key accounts than for other customers
Strongly agree 20%
Agree 64%
No opinion 6%
Disagree 10%
Strongly disagree
Given the current and forecasted economic climate, we will use more private carriage capability in the period 1981-86
Strongly agree 8%
Agree 24%
No opinion 13%
Disagree 43%
Strongly disagree 12%
Deregulation of the transportation system will lower costs of transportation
Strongly agree 36%
Agree 48%
No opinion 1%
Disagree 12%
Strongly disagree 3%
In the face of sharply increased costs, customer service levels will be lowered by most business firms in the 1980's
Strongly agree 3%
Agree 28%
No opinion 4%
Disagree 51%
Strongly disagree 14%
Given the current and forecasted economic climate, we will use more public warehousing to meet any expanded storage needs in the period 1981-86
Strongly agree 9%
Agree 49%
No opinion 11%
Disagree 28%
Strongly disagree 5%
Deregulation will improve service levels in the U.S. transportation system
Strongly agree 14%
Agree 45%
No opinion 11%
Disagree 25%
Strongly disagree 5%